



Good day! Welcome! Thank you for joining us for the iMATCH webinar training. Before we get started, I want to touch on a few housekeeping items.

About iMATCH

- ▶ Direct Certification system – used by SFAs to identify students eligible for free meal benefits via assistance programs (SNAP, TANF)
- ▶ System compares enrollment information from Infinite Campus and DSS data nightly
- ▶ Identical entries between the two files are matched, and listed on the corresponding school district list

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Just to touch base on what the iMATCH system is used for, and how it works...

Software Support

- ▶ Windows 7 and 8 no longer supported
- ▶ Cybersoft may have difficulty in providing technical assistance for unsupported operating systems
- ▶ Provide communication to the technology coordinator

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One note regarding software support...

Windows 7 and 8 may still be able to process the application, however, mainstream support would no longer be available from the software company.

Features to Cover

- ▶ Obtaining Direct Certification List
- ▶ Direct Certification Notification Letters
- ▶ New Match Notification Email to SFA
- ▶ Determine daily change of Direct Cert List
- ▶ Direct Certification by school site
- ▶ File Search feature
- ▶ How to use the Potential Matches tab

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Today we will cover the following areas.

Obtaining the Direct Certification List

► Student Eligibility → Administration → DC Matching → Matched tab

The screenshot displays the 'Student Eligibility' system interface. On the left is a navigation menu with 'Student Eligibility' highlighted. The main area is titled 'DC Matching' and contains several tabs: 'Potential Matches', 'Sibling Search', 'Matched' (which is selected and highlighted), and 'File Search'. Below the tabs are search filters for 'Academic Year' (set to 2017-2018), 'Site Code', and 'Site'. The 'Student Details' section includes fields for 'Last Name', 'First Name', 'ID', and 'Grade', along with a 'Status' dropdown (set to 'Active') and checkboxes for 'Active' and 'Inactive'. The 'Date' section has radio buttons for 'File', 'Effective', and 'Match' (selected), with 'From' and 'To' date fields. The 'Match Method' section has checkboxes for 'System', 'Sibling', 'Manual', and 'Transfers' (all checked). The 'File Details' section has a 'Case Number' field. At the bottom, there are two 'Exclude' checkboxes: 'Exclude Previously Notified Students' and 'Exclude Previously Free Students'. 'Reset' and 'Apply' buttons are on the right side of the form.

We will first touch on how to obtain the direct certification list for your SFA, or school district.

After logging in, select Student Eligibility, Administration, and then DC Matching. Click the Matched tab, and make sure all of the match methods are selected.

The PrimeroEdge software has added some 'exclude' boxes to help with load times. When the 'exclude' boxes are selected (as preset), the system would not display students if they have:

- Students that have been already matched
- Students that have already been notified via the in-system notification letter

It would be suggested unselect the 'exclude' checkboxes.

From here, you can click apply.

After clicking apply, the system will display all students in your SFA that are identified as directly certified for free meal benefits.

- **This is the main function that you will use in the system.**

Update your Point of Service system and eligibility information based on the students listed in the Matched tab.

- Remember to supersede benefits to Direct Certification SNAP whenever possible. If a

household previously submitted an application with income, but now a student from the household is being displayed in the Matched tab, update your student eligibility to reflect that the student is Direct Certification SNAP.

- Additionally, EXTEND these DC SNAP benefits to all other students within the household, and update your eligibility roster and POS system accordingly.

Remember to properly report these Direct Certification SNAP students from the Eligibility Roster and from the iMATCH System's Matched tab on your Verification Report in November.

We will touch more on this topic in the following slide.

Exclude Checkboxes

The screenshot shows the 'DC Matching' software interface. At the top, there are tabs for 'Potential Matches', 'Sibling Search', 'Matched', and 'File Search'. Below these, there are dropdown menus for 'Academic Year' (set to 2017-2018), 'Site Code' (set to -- ALL --), and 'Site' (set to -- ALL --). The 'Student Details' section includes fields for 'Last Name', 'First Name', 'ID', and 'Grade' (set to --All--), along with 'Status' (Active/Inactive) and 'Date' (File/Effective/Match). The 'Match Method' section has checkboxes for 'System', 'Sibling', 'Manual', and 'Transfers'. The 'File Details' section has a 'Case Number' field. On the right, there are 'Reset' and 'Apply' buttons. At the bottom, the 'Options' section contains two checkboxes: 'Exclude Previously Notified Students' and 'Exclude Previously Free Students', both of which are currently checked.

► Un-check the Exclude Checkboxes

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To re-iterate the point regarding Exclude checkboxes -

The PrimeroEdge software has added some 'exclude' boxes to help with load times. When the 'exclude' boxes are selected (as preset), the system would not display the following conditions:

- Students that have been previously notified by using the automated iMATCH notification letters
- Transfer students that had benefits in a previous school district
- Students that had a lower level of benefits (like TANF), and are now matched at a higher level of benefits (like SNAP)

It would be suggested unselect the 'exclude' checkboxes.

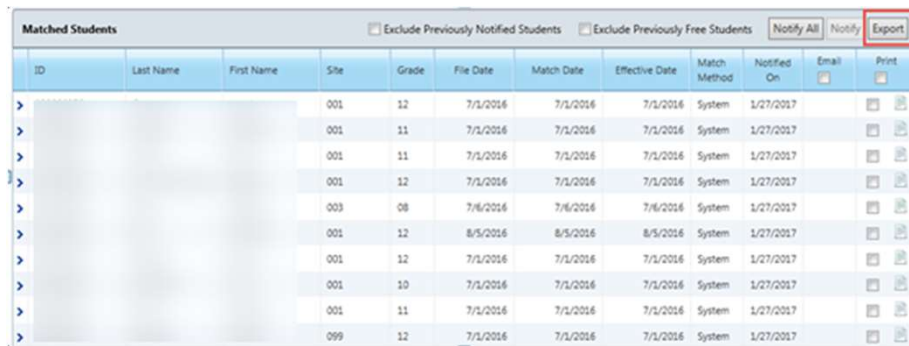
From here, you can click apply.

After clicking apply, the system will display all students in your SFA that are identified as directly certified for free meal benefits.

The following slide will discuss how to export the direct certification list into Excel format.

Obtaining the Direct Certification List – Exporting

- ▶ Export allows to save full list in Excel format



The screenshot shows a web application titled "Matched Students". It includes two checkboxes: "Exclude Previously Notified Students" and "Exclude Previously Free Students". To the right are buttons for "Notify All", "Notify", and "Export" (which is highlighted with a red rectangle). Below these is a table with the following columns: ID, Last Name, First Name, Site, Grade, File Date, Match Date, Effective Date, Match Method, Notified On, Email, and Print. The table contains several rows of student data, with some rows expanded to show more details.

| ID | Last Name | First Name | Site | Grade | File Date | Match Date | Effective Date | Match Method | Notified On | Email | Print |
|----|-----------|------------|------|-------|-----------|------------|----------------|--------------|-------------|-------|-------|
| > | | | 001 | 12 | 7/1/2016 | 7/1/2016 | 7/1/2016 | System | 1/27/2017 | | |
| > | | | 001 | 11 | 7/1/2016 | 7/1/2016 | 7/1/2016 | System | 1/27/2017 | | |
| > | | | 001 | 11 | 7/1/2016 | 7/1/2016 | 7/1/2016 | System | 1/27/2017 | | |
| > | | | 001 | 12 | 7/1/2016 | 7/1/2016 | 7/1/2016 | System | 1/27/2017 | | |
| > | | | 003 | 08 | 7/6/2016 | 7/6/2016 | 7/6/2016 | System | 1/27/2017 | | |
| > | | | 001 | 12 | 8/5/2016 | 8/5/2016 | 8/5/2016 | System | 1/27/2017 | | |
| > | | | 001 | 12 | 7/1/2016 | 7/1/2016 | 7/1/2016 | System | 1/27/2017 | | |
| > | | | 001 | 10 | 7/1/2016 | 7/1/2016 | 7/1/2016 | System | 1/27/2017 | | |
| > | | | 001 | 11 | 7/1/2016 | 7/1/2016 | 7/1/2016 | System | 1/27/2017 | | |
| > | | | 099 | 12 | 7/1/2016 | 7/1/2016 | 7/1/2016 | System | 1/27/2017 | | |

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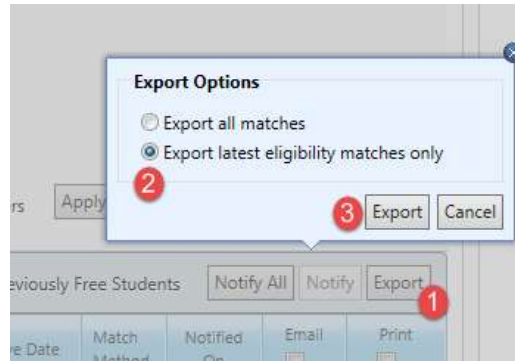
Export allows to save full list in Excel format

- This may be helpful for electronic point of service system uploading. Discuss with your school's technology coordinator.

We will continue on the following slide.

Obtaining the Direct Certification List – Exporting

- ▶ Export allows to save full list in Excel format



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After clicking 'Export' an 'Export Options' window will appear.

Select the radio button indicating 'Export latest eligibility matches only'. This will allow for your export to capture the most updated benefit information and will limit to a single entry display per student, and ensure that you are also including transfer students.

We will touch on notification letters on the following slide.

Notification Letters

| Matched Students | | | | | | | | | | | Notify All | Notify | Export |
|------------------|-----------|------------|------|-------|--------|-----------|------------|----------------|--------------|-------------|------------|--------|--------|
| ID | Last Name | First Name | Site | Grade | File # | File Date | Match Date | Effective Date | Match Method | Notified On | Email | Print | |
| > | | | 003 | 06 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | |
| > | | | 001 | 11 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | |
| > | | | 001 | 09 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | |
| > | | | 009 | 05 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | |
| > | | | 002 | 07 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | |
| > | | | 001 | 09 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | |
| > | | | 001 | 11 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | |
| > | | | 001 | 12 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | |
| > | | | 002 | 06 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | |
| > | | | 001 | 12 | 2235 | 7/1/2019 | 7/1/2019 | 7/1/2019 | Transfer | | | | |

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Going back to our Direct Certification list, the software has capability to generate notification letters. These notification letters can be printed in full, or individually.

When set up, the system can automatically generate notification letters. Each student's individual letter can be clicked to print, identified by the blue border on the right.

- All that is needed is to enter the Determining Official name and contact information on a screen, and you are ready to go.

- As you can see though, currently, the automated notification letters are not available for Transfer students, as recognized by the green ovals.

Please note – only use these notification letters if your agreement with CANS has identified that these letters will be used.

We will touch on how to set up your official fields for notification letters within the system on the next slide.

Notification Letters

- ▶ System -> Sites and Users-> SFAs
 - Official tab

The screenshot displays the iMATCH system interface. At the top, a dark navigation bar contains 'Student Eligibility' and 'System', with 'System' highlighted by a red box. Below this, a left sidebar lists navigation options: 'Sites and Users' (highlighted with a red box), 'Users', 'Roles', 'SFAs' (highlighted with a red box), 'Sites', 'Administration', 'Support Cases', 'Configuration', and 'Data Exchange'. The main content area is titled 'SFA Details' and features tabs for 'Set Up', 'General Info', 'Officials' (highlighted with a red box), 'Sites', and 'Users'. A note states: 'This information is used to populate letters. Blank fields may impact readability.' The 'Child Nutrition Director' section contains form fields for Title (Director of Food Service), Email, UserId, Salutation (dropdown), First Name, Last Name, Street / PO Box, City, State (SD), Zip, Phone, and Fax. A 'Determining Official' section is partially visible at the bottom. The number '10' is in the bottom right corner.

If you are going to use the automated letters to notify households of direct certification benefits from the iMATCH system, select System at the top, then click Sites and Users. Next, click SFAs. You will next click the 'Officials' tab.

We will look closer on the next slide.

Notification Letters

► Official tab – Determining Official

Determining Official

Title: Business Manager Email: [Redacted]

User Name: [Redacted] Salutation: --Select--

First Name: Jim Last Name: Johnson

Street / PO Box: [Redacted]

Address2: [Redacted]

City: [Redacted] State: SD Zip: [Redacted]

Phone: (605) 555-5555 Fax: [Redacted]

Save

Now that you are on the Officials tab, scroll down the page, and add information as needed. Remember, you would only need to do this if your SFA is planning on using the automated notification letters, and have indicated as such in your annual agreement with CANS.

Only the Determining Official information would need to be completed, as the iMATCH system is not set up for any processes other than Direct Certification. Remember to include a phone number, in the event of a household needing to contact the school regarding the addition of a student to the household or refusal of benefits.

When you are completed providing information for your determining official, scroll to the bottom, and click Save.

The determining official's information provided in iMATCH will be automatically populated on the Direct Certification notification letters. Remember to include the same Determining official name in your annual iCAN application, for consistency.

If you are using the notification letters from iMATCH, it is suggested to look at the Print Preview prior to printing. Your school computer administrator may need to install a plug-in. If you run into system problems, contact PrimeroEdge may be of some assistance.

We will circle back to the Direct Certification List on the following slide.

New Match Notification Email

From: IMATCH@state.sd.us <IMATCH@state.sd.us>
Sent: Friday, January 20, 2017 2:03 PM
To: [REDACTED]
Subject: New Direct Approval Matches for 1/20/2017

Good Afternoon,

You have new Direct Approval matches that are ready to be notified. They can be found by following this path: *Student Eligibility* >> *Administration* >> *DC Matching*. Click the previously matched tab, and then check the Exclude Previously Notified Students checkbox.

Have a great day!

Student Eligibility → Administration → DC Matching → Matched tab

DC Matching

Potential Matches | Sibling Search | **Matched** | File Search

Academic Year [REDACTED]

Site Code [REDACTED] Site [REDACTED]

SSN / Student ID [REDACTED] Last Name [REDACTED] First Name [REDACTED] Grade [REDACTED] Status [REDACTED]

Case Number [REDACTED] Match Date From [REDACTED] Match Date To [REDACTED] Match Method [REDACTED]

☒ System ☒ Sibling ☒ Manual ☒ Transfers **Apply** **Reset**

Add a one-day buffer in the 'From' date range

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The iMATCH system has a notification email, which sends a basic notification to all users in your SFA when a new match has been determined. The notification is not specific, but is to be used as an alert to check the system. Use the date range feature from the Matched tab to observe the new matches.

Due to one file being 'scanned' before midnight and the other file being 'scanned' after midnight, add an extra day on the front-end of your date range for best results.

If you have multiple school employees with an active iMATCH User ID, back-up users may consider reaching out to their technology coordinator to set up an email rule for automatic filing of these notifications. This said, it is still important for the primary user to keep an eye on these email notifications, and update the schools benefit issuance accordingly.

Eligibility Hierarchy

- iMATCH identifies the hierarchy of direct certification benefits
- SNAP > TANF
- Supersede to direct certification – highest form of direct certification is SNAP

Patrons → Students → search for a student → click on the Student ID

The screenshot shows the 'Student Eligibility' system interface. On the left, there is a sidebar with 'Patrons' and 'Students' tabs. The 'Students' tab is selected. The main area contains search filters for Site Code, Site, Grade, and Student ID/SSN. Red boxes and numbers 1, 2, and 3 highlight the 'Patrons' tab, the 'Students' tab, and the 'Last Name' and 'First Name' search fields respectively.

One design aspect of the iMATCH system that we haven't really discussed before is iMATCH identifies the hierarchy of direct certification benefits for the assistance programs that it has access to.

- The system has access to SNAP and TANF – although these are commonly lumped together since they both yield free meal benefits, they are two distinct assistance programs for households.
- SNAP is considered the highest form of direct certification – we would always want to supersede to direct certification whenever available, but to take it a step further, supersede to SNAP.

Please keep this in mind, as a student may be matched with TANF early in the year – as the year goes on, if the student is matched with SNAP, you will receive an email alert.

You can see a student's historical data for eligibility, which can come in handy for situations like this.

Patrons → Students → search for a student → click on the Student ID

→ Click the Eligibility tab to see historical data

Direct Certification List

– Daily Change using Date Range

DC Matching

Potential Matches | Sibling Search | **Matched** | File Search

Academic Year: 2017 - 2018

Site Code: -- All -- | Site: -- All --

SSN / Student ID: | Last Name: | First Name: | Grade: | Status: Active

Case Number: | Match Date From: 1 | Match Date To: 2 | Match Method: ☒ System ☒ Sibling ☐ Manual ☐ Transfers

Apply | Reset 3

Matched Students ☐ Exclude Previously Notified Students ☐ Exclude Previously Free Students

| ID | Last Name | First Name | Site | Grade | File Date | Match Date | Effective Date | Match Method | Notified On | Email | Print |
|----|-----------|------------|------|-------|-----------|------------|----------------|--------------|-------------|-------|-------|
|----|-----------|------------|------|-------|-----------|------------|----------------|--------------|-------------|-------|-------|

Student Eligibility → Administration → Matching

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Here, we are back on the Matched tab, found in Student Eligibility -> Administration -> DC Matching.

As previously described, the 'Matched' tab also features a date range. Use the date range feature from the Matched tab to observe the new matches.

You can adjust the date range to determine when newly matched students are eligible. When using the date range, it is suggested to add an extra day to the 'From' box and the 'To' box, to ensure that you are capturing the information that you are looking for.

After a date range is entered, click apply.

The list of students displayed would come from only the date range identified.

We will show another organizing feature on the following slide.

Direct Certification List

► Column Sorting

| Matched Students | | | | | | | | | | | | Notify All | Notify | Export |
|------------------|-----------|------------|------|-------|--------|-----------|------------|----------------|--------------|-------------|-------|------------|--------|--------|
| ID | Last Name | First Name | Site | Grade | File # | File Date | Match Date | Effective Date | Match Method | Notified On | Email | | | Print |
| > | | | 003 | 06 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | | |
| > | | | 001 | 11 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | | |
| > | | | 001 | 09 | 2235 | 7/1/2019 | 7/9/2019 | 7/1/2019 | System | 8/1/2019 | | | | |

If you would prefer not to use the date range modifier, you can instead sort by columns from the Matched tab.

Here, you can click any of the columns in blue, to sort. Some SFAs may find it helpful to sort by last name, or maybe match or file date.

- The school would use the File Date as the effective date of benefits if the school is utilizing the File Date flexibility as found in the Annual Information Update attachment item of the Checklist Item section of the iCAN application.

Hypothetically speaking, you could sort by the Match date, and scroll through the list, from the earliest matches up to the most recent matches. This can be beneficial when determining start date of eligibility.

Using the Matched tab is the suggested method to observe a district-wide list of students that have been matched in the iMATCH system, as this also contains a drop-down menu if you prefer to select a specific site within the district.

That said, we will show another method that can be used to observe a list of students broken down by site that have been matched.

Direct Certification by Site

Student Eligibility → Administration → DC Matching → Matched tab

Student Eligibility System

Applications

Administration

Direct Approvals

DC Matching

Grace Period Letters

Patrons

Application Reports

DC Matching

Potential Matches Sibling Search Matched File Search

Academic Year

Site Code Site

-- All -- -- All --

SSN / Student ID Last Name First Name Grade Status

--All-- Active

Case Number Match Date From Match Date To Match Method

☒ System ☒ Sibling ☒ Manual ☒ Transfers

Apply Reset

Select a specific site

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There are multiple ways to do the same task – this is probably the easiest way to identify a list of students receiving benefits per a specific site within your School Food Authority.

Go to the Matched tab, as we have previously discussed.

Before selecting 'Apply', use the Site drop-down arrow to select a specific site. Now, when you click 'Apply', you will bring up a list of directly certified students that enrolled at the selected site.

We will look at another way to obtain this information on the following slide.

Direct Certification by Site

- ▶ Student Eligibility
- ▶ Eligibility Reports
 - Eligibility (uncheck Paid, Reduced)
 - Reason (uncheck Default, Denied)

The screenshot shows the 'Student Eligibility' system interface. On the left is a navigation menu with options: Administration, Direct Approvals, DC Matching, Patrons, Eligibility Reports (highlighted), DC Sibling, Eligibility Roster (highlighted), and Configuration. The main area is titled 'Eligibility Roster'. It features a 'Site Code' dropdown set to 'SITE', a 'Grade' dropdown set to 'ALL--', and an 'As of Date' field set to '6/29/2016'. Below these are two main sections: 'Eligibility' and 'Reason'. The 'Eligibility' section has checkboxes for 'Free' (checked), 'Reduced' (checked), and 'Paid' (unchecked). The 'Reason' section has a grid of checkboxes: 'Uncheck All' (checked), 'Categorical' (checked), 'Even Start' (checked), 'Pre-Approval' (checked), 'CEP Transfer' (checked), 'Foster' (checked), 'Grace Period' (checked), 'RCC' (checked), 'DC Foster' (checked), 'DC Medicaid' (checked), 'Head Start' (checked), 'Refused Benefits' (checked), 'DC SNAP' (checked), 'Homeless' (checked), 'Removed' (checked), 'DC Unmatched' (checked), 'Import' (checked), 'Runaway' (checked), 'Income' (checked), 'Transfer' (checked), 'Verification' (checked), 'Default' (checked), 'Denied' (checked), 'Migrant' (checked), and 'Direct Cert' (checked). There are also 'Options' (Display Eligibility Code, Display Contact Info, Sort by Grade, Only Verification Sites) and 'Include' (Inactive Students, Inactive Sites) sections. A 'Generate Report' button is at the bottom right.

Using the Eligibility Report, you are also able to obtain a list of directly certified students enrolled per site.

The Eligibility Roster is nice, as you can export data in an excel document, and have each tab in the excel document be a different site.

Follow these steps:

Click Student Eligibility,
Eligibility Reports

In the Eligibility box, uncheck Paid, Reduced
In the Reason box, uncheck Default, Denied

We will have a larger image on the following slide

Direct Certification by Site

Student Eligibility
System

Administration

Direct Approvals

DC Matching

Patrons

Eligibility Reports

DC Sibling

Eligibility Roster

Configuration

Eligibility Roster

Site Code: --ALL--

Site: --ALL--

Grade: --ALL--

As of Date: 6/29/2016

Eligibility

☒ Free
☐ Reduced
☐ Paid

Options

☐ Display Eligibility Code
☐ Display Contact Info
☐ Sort by Grade
☐ Only Verification Sites

Include

☐ Inactive Students
☐ Inactive Sites

Reason

☒ Uncheck All
☒ Categorical
☒ CEP Transfer
☒ DC Foster
☒ DC Medicaid
☒ DC SNAP
☒ DC Unmatched
☐ Default
☐ Denied
☒ Direct Cert

☒ Even Start
☒ Foster
☒ Grace Period
☒ Head Start
☒ Homeless
☒ Import
☒ Income
☒ Migrant
☒ Pre-Approval
☒ Principal Approved
☒ RCG
☒ Refused Benefits
☒ Removed
☒ Runaway
☒ Transfer
☒ Verification

Generate Report

As we can see, there is also a site modifier at the top of the screen, if you wanted to change the report to one specific site.

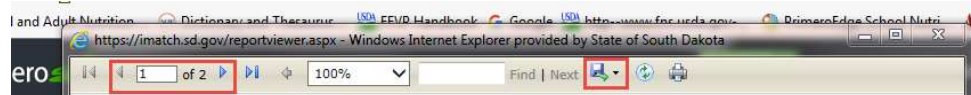
Next, in the Eligibility box, as stated on the previous slide, you will want to make sure to 'un-check' Reduced and Paid.

Also, in the Reason box, you will want to make sure to 'un-check' Default and Denied.

We have highlighted the boxes to un-check. Once you have un-checked the necessary boxes, click 'Generate Report' in the bottom right corner.

After you click 'generate report', an additional window will be displayed. You can page through to find the different site reports. More on the following slide.

Direct Certification by Site



- Arrows allow user to page through to additional students, or additional sites
- Floppy disk Save icon allows users to save file as Excel
 - Saving as Excel features each site to display as a different tab in Excel

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- Arrows on the generated report allow the user to page through to additional students, or additional sites
- The Floppy disk Save icon allows users to save file as Excel
 - Saving as Excel allows for each site to display as a different tab in Excel
 - If you intend on looking at site-based direct certification data, I would suggest saving the document as an Excel document, as the list is more manageable and user-friendly.

Typically, SFAs with meal count software will use the full SFA-wide direct certification list found in the Matched tab, however, this site-based report may be helpful for schools using a manual meal count method, when eligibility is applied to student counts in the office afterward.

We will look at some search features on the following slide.

Potential Matches

- ▶ Student Eligibility
- ▶ DC Matching
- ▶ Potential Matches

The screenshot shows the iMATCH system interface. On the left is a sidebar with navigation links: 'Student Eligibility' (highlighted), 'System', 'Applications', 'Administration', 'Direct Approvals', 'DC Matching' (highlighted), 'Grace Period Letters', 'Patrons', 'Students', 'Application Reports', and 'Direct Approval'. The main content area is titled 'DC Matching' and has three tabs: 'Potential Matches' (highlighted), 'Sibling Search', 'Matched', and 'File Search'. Under the 'Potential Matches' tab, there are search filters for 'Student Details' (Last Name, First Name, ID, Birth Date), 'Probability' (High, Medium), and 'Compare Status' (Not Reviewed, Reviewed). Below these filters is a table titled 'Potential Match Details' with columns for 'PrimerEdge Student Details' (Student ID, Last Name, First Name, Birth Date) and 'Certification File Details' (ID on File, Last Name, First Name, Birth Date, Probability). The table currently shows 'No records to display.'

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The iMATCH system matches enrollment information from Infinite Campus with students identified from Department of Social Services that receive monetary assistance benefits from SNAP and TANF. Various criteria between the two files is automatically compared. Criteria have certain 'point values' assigned, for scoring an automatic match. When the comparison of the two files reaches 44 points, an automatic match occurs.

If the comparison of enrollment file and direct certification file result in a high point score, but not high enough to make an automatic match, the comparison of files can be found in the Potential Matches tab.

The Potential Matches tab features a probability ranking, which provides the likelihood that a student listed from the DSS file matches a particular student entry from the enrollment information listed in Infinite Campus list for your school.

Prior to observing your list, you can select High and/or Medium probability to observe. Additionally, if a user has already reviewed particular entries in the Potential Matches tab, the 'Compare Status' checkboxes allow the user to only display entries which have not yet been reviewed.

Please Note: The system has recently changed settings to automatically default display both High and Medium probability. You can un-check Medium, and click apply to only display 'High'.

- Please stay caught up with at least the High probability potential matches. We will walk

through how to review or manually match Potential Matches in the following slide.

Potential Matches Reviewing entries

| Potential Match Details | | | | |
|-------------------------------|-----------|------------|------------|----------------|
| 1 PrimeroEdge Student Details | | | | |
| Student ID | Last Name | First Name | Birth Date | Eligibility |
| | | | | Paid (Default) |

| 2 Certification File Details | | | |
|------------------------------|------------|------------|-------------|
| Last Name | First Name | Birth Date | Probability |
| | | | High (42) |

3 Compare...

As previously indicated, the Potential Matches list provides a list of students that have a high and medium probability of matching, but did not meet the required amount of points for an automatic match to occur.

It is best practice to observe the High-probability student files first. Make sure that the 'High' probability checkbox is checked, then click apply.

The column on the left, labelled 'PrimeroEdge Student Details' (identified on the slide by the green border and number 1) is the enrollment file from the school's Infinite Campus.

- Here, we can see the Student ID, Last Name, First Name, and also Eligibility that was reported in the Student Information Enrollment File.
- Please keep in mind that the Eligibility displayed in the enrollment file may not be accounting for the Free Direct Certification eligibility, as this page is displaying Potential Matches – not those that have already been matched.

The column on the right, labelled 'Certification File Details' (identified by on the slide by the blue border and number 2) is the Direct Certification file from Department of Social Services.

The iMATCH system has made a comparison between the two files, and determined that the enrollment file on the left, and the direct certification file on the right, have very similar student data, but not similar enough for an automatic match to occur. This is where you come in.

You will see a link toward the middle of the two lists, labelled 'Compare'. This link is identified on the slide by the red border, and number 3.

When we click the 'Compare' link, the user will be able to look at specifics between the Enrollment file from the left side, and the Direct Certification file from the right side.

We will look at more detail on the following slide.

Potential Matches

- Matching Criteria
- Reviewing possible match
- Making the Match

| Matching Criteria | Student Details | File Details | Points |
|--------------------------------|-----------------|--------------|--------|
| SSN | | | 0 |
| Student ID | | | 0 |
| State ID | | | 0 |
| Full Name | | | 0 |
| First and Last Name | | | 0 |
| Last and Middle Name | | | 0 |
| First and Middle Name | | | 0 |
| Last Name | | | 10 |
| First Name | | | 0 |
| DOB | | | 14 |
| Phonetic First Name | | | 0 |
| Phonetic Last Name | | | 0 |
| SOUNDEX First Name | | | 0 |
| SOUNDEX Last Name | | | 0 |
| Modified First Name | | | 0 |
| Modified Last Name | | | 0 |
| Name Twist Full Name | | | 0 |
| Name Twist First and Last Name | | | 0 |
| Variable DOB (±10 day(s)) | | | 0 |
| DOB Month Year Twist | | | 0 |
| Gender | | | 0 |
| Street Address | | | 0 |
| Guardian | | | 6 |
| Phone 1 | | | 0 |
| Phone 2 | | | 0 |
| County Code(s) | Brown | Brown | 12 |
| Total - 42 (High) | | | |

Comments: (Limited to 500 Characters)
Please enter comments if this is an appropriate match.

Provide reason/comment, then click 'Match'

Match Mark as Reviewed Close

If not a match, click 'Mark as Reviewed'

Here, we can see the ‘score card’ displaying the matching criteria, and comparing the student enrollment information with the direct certification information.

Since we are handling sensitive data, we do need to redact specific information for the purposes of this training.

We can see that the Student Details (also known as the enrollment information from Infinite Campus) and the File Details (also known as the Direct Certification File from Department of Social Services) have some consistent fields. The fields highlighted in green are consistent between the two files.

Only the school can know for sure if these two entries are the same student. If this is the same student, the data files can be manually matched. We will discuss more on the following slide.

If the school has determined that the student identified in the enrollment file from the Student Details column is the same student as the student identified in the direct certification file from the File Details column, the school can make a manual match.

In order to make a manual match, the user would click the ‘Match’ button displayed toward the bottom of the scorecard – identified on this slide by the red border, and red arrow.

The user also has the capability of marking the student as ‘reviewed’. Marking a student as

reviewed could be used if the user has identified that the student files displayed are not the same student.

We will look at the File Search tab on the follow slide.

File Search

- ▶ Student Eligibility
- ▶ Administration
- ▶ DC Matching
- ▶ File Search

The screenshot shows the 'File Search' tab selected. Callout 1 points to the 'Case Number' input field in the 'Details' section. Callout 2 points to the 'Apply' button. Callout 3 points to the 'View Details...' button in the 'File Details' table. Callout 4 points to the 'View Details...' button in the 'Certification File Details' table.

| PrimeroEdge Student Details | | Certification File Details | | | | | | | |
|-----------------------------|------------|----------------------------|-----------|------------|------------|-------------|---------|-----------|--|
| Match Card | ID on File | State ID | Last Name | First Name | Birth Date | Case Number | DC Type | File Date | |
| View Details... | | | | | | | | | |
| View Details... | | | | | | | | | |

Schools can use the 'File Search' tab to locate students to determine if they have benefits.

The File Search tab can be found in the same section as the Matched tab – click Student Eligibility, Administration, DC Matching, and then click File Search.

Select the radio button which you wish to search by.

- Please note that 'State ID' was recently added to the system, however, this search criteria is in regard to a unique identifier provided by the SNAP office. South Dakota's DSS office currently does not utilize a unique individual ID, so this search criteria will not currently yield results.

Schools commonly use this feature to validate Case Numbers written on applications, however, all search categories conduct state-wide searches.

If the school chooses to validate the case number in the iMATCH system, the student's eligibility can be considered as 'directly certified', which can extend to other enrolled children in the household. These directly certified students are also exempt from the Verification Selection Pool. If the case number cannot be found in the system, the school should follow up with the household.

An additional note – the full case number must be entered in the File Search. Case numbers in South Dakota are 9 digits long, and always have at least 1 lead-zero. So, for example, If a household provided a six-digit case number on a household application

without any lead-zeroes, you may need to enter three lead-zeroes, and then the case number provided.

We will discuss how to make manual matches from the File Search tab on the following slide.

Manual Match from File Search

Potential Matches Sibling Search Matched **File Search**

Search By

☐ SSN and Birth Date
 ☐ Name and Birth Date
 ☒ Case Number
 ☐ State ID

Details

Case Number

Reset Apply

File Details

| PrimerEdge Student Details | | Certification File Details | | | | | | | |
|----------------------------|-----------------|----------------------------|-----------|------------|------------|-------------|---------|-----------|--|
| Match Card | ID on File | State ID | Last Name | First Name | Birth Date | Case Number | DC Type | File Date | |
| ... | View Details... | | | | | | | | |
| ... | View Details... | | | | | | | | |

PrimerEdge - Lookup

Site Code: --ALL--
 Site: --ALL--
 Grade: --ALL--

☒ Student ID/SSN
 Last Name:
 First Name:

☐ PIN
☐ State ID

ID/SSN:
 Birth Date:
 Status: Active

Search

| Name | Student ID/SSN | Site Name | Grade | Homeroom | Birth Date |
|------|----------------|-----------|-------|----------|------------|
| > | | | | | |
| > | | | | | |

If you would like to make manual matches from the File Search tab,

- First, enter the search data (such as a case number) and click 'Apply'; You may see an ellipses (3 dots) in the Student Enrollment details (as seen by number 3)
- Click the ellipses to bring up the Student Lookup page. This is where you are identifying which enrolled student to compare to the DSS file record
 - If you follow the colored headers as previously discussed, we already have the DSS record from the Orange header; we are now trying to find the appropriate student record for the green header to pair.

- Consult your student enrollment, and make sure to enter the student name which corresponds with the name identified in the Certification File Details.

-After typing in the student name, select the name from the results list below, turning the students name blue, then click OK.

- These steps tell the system which enrolled student you wish to compare with the direct certification file details.

We will continue on the following slide.

Manual Match from File Search

After we have selected the enrolled student which we feel is the student identified in the Direct Certification File details (from the orange header), we will click 'View Details' back from the File Search page.

'View Details' brings up the scorecard, which you may remember from the Potential Matches tab.

Here, we are able to compare the Student Enrollment File with the Direct Certification File, to make a logical decision on whether we should match the student files.

If you are sure that the enrolled student in the Student Details list is the same student as the student identified in the Direct Certification list, you may click the Match button.

Remember to make sure that you are updating your point of service system to reflect proper student eligibility.

Thank you!

- ▶ CANS Office: 605-773-3413
- ▶ CANS Email: DOE.SchoolLunch@state.sd.us
- ▶ PrimeroEdge Customer Support:
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We have covered a lot of material today. Please feel free to contact the CANS office or PrimeroEdge with any questions.

Thank you for observing the training webinar on iMATCH. Are there any questions?

iMATCH User Training

This training credits for 45 minutes of training in

Key Area 3 – Administration

3120 Direct Certification

Your Name:

Date of Training:

